

# **BUSINESS OPPORTUNITY**

CC-GRSM007-27

*Department of the Interior*

National Park Service  
Great Smoky Mountains National Park

**Guided Horseback Rides, Wagon and/or Carriage Rides, Vending,  
Firewood and Ice, Camper Convenience Items, Souvenirs, and Souvenir  
Photography at Smokemont Riding Stables**

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## INTRODUCTION

The National Park Service ("Service") intends to award a concession contract within Great Smoky Mountains National Park ("Park") for guided horseback rides, wagon and/or carriage rides, vending, firewood and ice, camper convenience items, souvenirs, and souvenir photography at Smokemont Riding Stables. This Prospectus describes in general terms the existing business operations and the future business opportunities for the facilities and services required by the Service. Those submitting proposals ("Offerors") must review all sections of this Prospectus and specifically, the terms and conditions of the Draft Concession Contract CC-GRSM007-27("Draft Contract"), including its exhibits, to determine the full scope of the future concessioner's responsibilities under the Draft Contract.

The Service is conducting this solicitation in accordance with the National Park Service Concessions Management Improvement Act of 1998 (Public Law 105-391), as implemented by regulations in 36 C.F.R. Part 51. The term "Concessioner" as used in this Prospectus refers to the Offeror awarded the Concession Contract CC-GRSM007-27. The term "Existing Concessioner" refers to Smokemont Stables, Inc., the concessioner that provides guided horseback rides, wagon and/or carriage rides, vending, firewood and ice, camper convenience items, souvenirs, and souvenir photography at Smokemont Riding Stables under the existing Concession Contract CC-GRSM007-17("Existing Contract"). The Existing Contract, as amended, and a copy of 36 C.F.R. Part 51, the Service's concession contract regulations applicable to this Prospectus, are available upon request or linked in Part V of this Prospectus (Appendices Table of Contents and Links).

In the event of any inconsistency between the terms of this Prospectus and 36 C.F.R. Part 51, 36 C.F.R. Part 51 will control. In the event of any inconsistency between the description of the terms contained in this Prospectus and the Draft Contract, the attached Draft Contract will control.

Given the popularity of the Park, and the variety of services available to the public required under the Draft Contract, the Service believes this new concession contract for the Park presents an attractive business opportunity for a future concessioner.

## THE NATIONAL PARK SERVICE AND ITS MISSION

In 1916, President Woodrow Wilson approved legislation creating the Service within the Department of the Interior. That legislation mandated that Congress created America's National Park Service to:

*...conserve the scenery and the natural and historic objects and the wild life therein and to provide for the enjoyment of the same in such a manner and by such means as will leave them unimpaired for the enjoyment of future generations.*  
54 U.S.C. § 100101 (a)

Additionally, Congress declared that the National Park System should be:

*...preserved and managed for the benefit and inspiration of all the people of the United States....* 54 U.S.C. § 100101 (b)



## GREAT SMOKY MOUNTAINS NATIONAL PARK

Great Smoky Mountains National Park, located in North Carolina and Tennessee, spans 800 square miles, 95 percent of which are forested and feature large expanses of old growth. The Park is one of the largest protected areas in the eastern U.S. and is world renowned for the diversity of its plant and animal resources and the quality of its remnant southern Appalachian culture. Its status is emphasized by its designation as an International Biosphere Reserve and a World Heritage Site. The Park is located within 550 miles of one-third of the population of the U.S. With over nine million visitors annually, the Park is the most visited national park.

The Park is intended “for the benefit and enjoyment of the people.” This purpose was stated by Congress in the Act of May 22, 1926, which provided for the establishment of the Park. 16 U.S.C. §§ 403, et seq. The Act further defined the Park’s purpose by reference to the National Park Service Organic Act of August 25, 1916, which stated that the fundamental purpose of national parks is “to conserve the scenery and the natural and historic objects and the wildlife therein and to provide for the enjoyment of the same in such manner and by such means as will leave them unimpaired for the enjoyment of future generations.”

The Park provides the only habitat in the world for several plant and animal species, including the Cain’s reed-bent grass and the Jordan’s salamander. The Park is also home to between 1,000 and 2,000 black bears—the largest concentration of black bears in the eastern U.S. In addition, at least 60 native mammals live in the Park, including white-tailed deer and the endangered Indiana bat.

As a steward of significant historic cultural resources, the Park maintains its southern Appalachian heritage by housing over 100 historic buildings, along with cultural scenes and landscapes. A century of human history and its evolution in the Appalachian region is preserved within five major historic districts and other areas throughout the Park.

The Park accommodates myriad recreational opportunities with 384 miles of roads, over 800 miles of trails, 100 backcountry campsites and shelters, 1,000 front country campsites in 10 locations, more than 700 miles of streams, three visitor centers, 11 picnic grounds, and numerous scenic overlooks.

Surrounding communities provide tourists with a variety of services and amenities, including lodging, restaurants, fuel and transportation, retail, and other entertainment. These tourist communities continue to expand at increasing rates. A study conducted in 2012 indicated that visitors to the Park spend over \$741 million in the gateway communities surrounding the Park, topping 401 national park units in visitor spending.

Concerns to the Park come in many forms, some obvious and indisputable and others more subtle and controversial. These include, but are not limited to, concerns regarding air quality, forest insects and diseases, and also exotic plants and animals. Humans are the root cause of some of these problems, while nature produces and advances others. Ensuring the survival of the Park’s ecosystem is a major charge given to the Service.

Air quality remains a major Park concern. High ozone levels and acid precipitation present a health hazard and can damage ecosystems and vegetation. Moreover, visibility impairment due to air pollution diminishes the overall visitor experience. Air pollution does affect water quality, though Park waters remain mostly free of chemical pollutants.

Forest insects and diseases also threaten the Park’s ecosystem. A recent and serious insect threat is the hemlock woolly adelgid, the Asian relative of the balsam woolly adelgid. This small insect attacks the Park’s eastern hemlock trees, sometimes causing death in as little as two years. Other pests and diseases affecting Park ecosystems include chestnut blight, southern pine beetle, and dogwood anthracnose. Emerald Ash Borer, a tiny beetle that feeds exclusively on ash trees was confirmed in the Park during the summer of 2012. Thousand cankers disease, a fungus spread to walnut and butternut trees by the walnut twig beetle, was found in the Park in the fall of 2012. Emerald ash borer, thousand cankers disease, and other forest insects



and diseases can be transported in firewood. Potential future threats to the Park's ecosystem include impacts from gypsy moths and the Asian long-horned beetle.

Exotic plants and animals introduced into the natural ecosystem through a variety of sources also threaten Park resources. Exotic species compete for resources with native species, which can alter the community structure and invade large portions of the Park. Some exotic species are extremely invasive, and to combat them, the Park has launched an extensive program targeting these invasive exotic species so that native species will remain dominant in the ecosystem. Kudzu, mimosa trees, multiflora rose, and the European wild boar are among the Park's worst exotic species. Hay and farming equipment are common means of introduction for exotic plants.

The Park's 1982 General Management Plan (GMP) establishes long-range strategies for resource management, visitor use, and provides an integrated plan for the management of the Park. This plan creates a framework for all future programs, facilities, and management actions. The GMP addresses concession operations, in part, as follows:

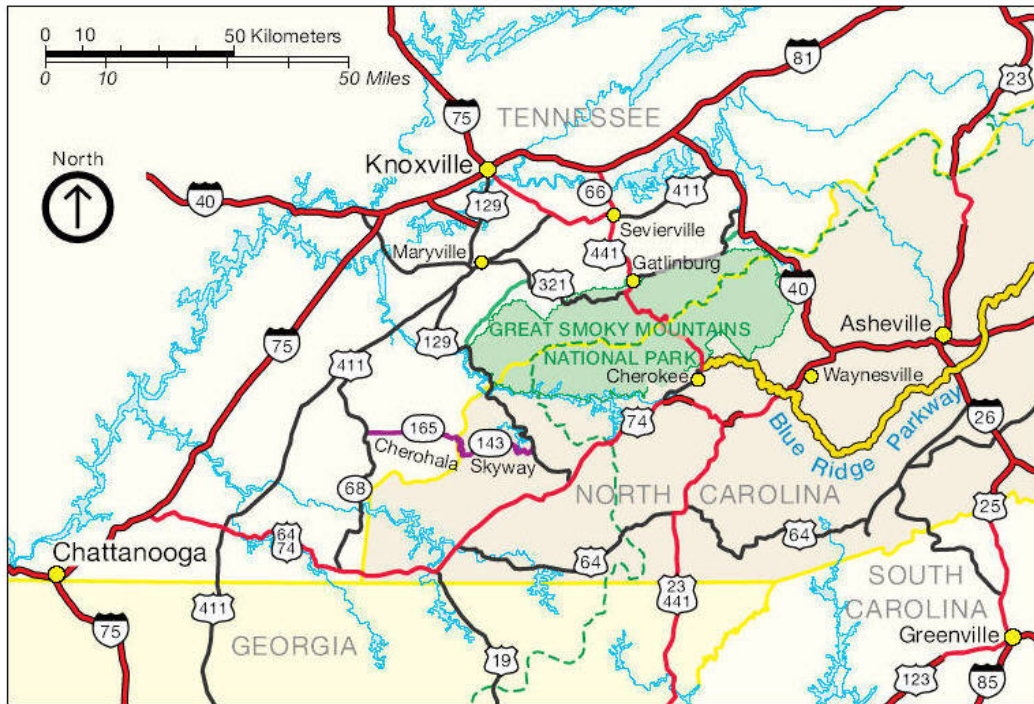
**CONCESSION SERVICES:** Park visitors are served well by adjacent communities, which provide varied lodging accommodations and eating facilities as well as regional crafts, souvenirs, and entertainment. There is little or no need for most such services within the Park.

Park concession services will be limited to fulfilling visitor needs that cannot be met or that would be inefficiently met by other sources. These include horseback rides within the Park, a campers' store, and the LeConte Lodge operation. Products of living history demonstrations, films, interpretive literature, pertinent postcards, and thematic mementos, as permitted by consideration of public health and National Park Service policies, will be available through the Great Smoky Mountains Natural History Association (page 33).



Exhibit 1 below presents an area map showing the Park and nearby landmarks. The Park is located in eastern Tennessee and western North Carolina approximately 45 miles from Knoxville, Tennessee, and 60 miles from Asheville, North Carolina. Interstate Highways 40, 75, and 81 provide access to the area. The primary gateway communities include Gatlinburg and Townsend, Tennessee, and Cherokee, North Carolina, all of which are within four miles of the Park.

**Exhibit 1. Area Map**



Source: [www.nps.gov/GRSM](http://www.nps.gov/GRSM)

## CONCESSION OPPORTUNITY

This Concession Opportunity includes Guided Horseback Rides, Wagon and/or Carriage Rides, Vending, and Souvenirs at Smokemont Riding Stables, in the Smokemont area of the Great Smoky Mountains National Park approximately seven miles from Cherokee, NC.

### Exhibit 2. Smokemont Riding Stables Existing Facilities



Source: National Park Service

### Concession Overview

The Existing Concessioner at Smokemont Riding Stables offers a one hour guided horseback ride on a three mile loop trail, a two and a half hour, guided horseback ride to a waterfall, and a four hour out and back guided horseback ride along the Bradley Fork Trail. Horseback trips proceed at a walking pace and have a maximum of fifteen riders per group.

The Existing Concessioner also offers guided, horse-drawn carriage rides which last approximately 30-45 minutes in length on a separate one-and-a-half-mile trail. The carriage that is currently in use can carry up to six passengers.

Trails used for horseback rides and carriage rides pass through a scenic, forested area of the Park on three trails assigned for use by the Concessioner. The Concessioner is responsible for maintaining the trails assigned.

The Concessioner may use up to 35 horses at a time in the operation. The business typically operates from mid-March through late November each year. The Concessioner is required to remove horses from the Area during the off season under the New Contract.

The Existing Concessioner also provides vending machine sales of soft drinks and bottled water and sells firewood, bagged ice, and camper convenience items to nearby Smokemont Campground visitors, as well as souvenir hats, tee shirts, patches and post cards in their merchandise operation.

### Exhibit 3. Smokemont Riding Stables Existing Facilities



**Stables – Exterior**



**Office – Exterior**



**Restrooms - Exterior**



**Barn - Exterior**

*Source: National Park Service*

Facilities the Existing Concessioner use include public restrooms, a paved parking lot, assigned trails, fencing, loading and unloading platforms, an office, a vending hut, an orientation hut, a barn and equipment storage building, and covered tie stalls (“Temporary Facilities”). All of the above facilities, with the exception of the public restrooms, paved parking lot, and assigned trails, are temporary concession facilities that are the personal property of the Existing Concessioner.

The public restrooms have fluorescent lighting, electric hand dryers, and an electric wall heater in the plumbing chase to keep pipes from freezing during the shoulder season. The parking lot has 20 parking spaces, one of which is an accessible parking space.

**Required and Authorized Services**

EXISTING CONTRACT

Exhibit 4 summarizes the Required and Authorized services under the Existing Contract.

**Exhibit 4. Required and Authorized Services under the Existing Contract**

<b>Required Services</b>	
Guided Horseback Rides	Guided trail rides include 1-hour, 2.5-hour, and 4-hour horseback rides using no more than 35 horses.
Wagon and/or Carriage Rides	Limited to three (3) horse-drawn vehicles per day
Vending	
Firewood and Ice	
Souvenirs	Sale of souvenir hats, tee shirts, patches, and post cards; other items with the Superintendent's approval.
Camper Convenience Items	Camper convenience items must be primarily packaged non-food items. A very limited selection of long shelf-life food items may also be approved by the Superintendent.
<b>Authorized Services</b>	
Souvenir Photographs	Sale of souvenir photographs per a plan approved by the Superintendent.

*Source: National Park Service*

DRAFT CONTRACT

Exhibit 5 summarizes the Required and Authorized concession services under the Draft Contract. The Concessioner must provide the Required Services and may, at its option, provide the Authorized Services. The Concessioner will submit a plan to the Superintendent detailing how, when, and where Authorized services will be provided. The Superintendent must approve all Authorized Services and any merchandise to be sold by the Concessioner.

**Exhibit 5. Required and Authorized Services under the Draft Contract**

<b>Required Services</b>	<b>Location</b>
Guided Horseback Rides, Wagon and/or Carriage Rides	Smokemont Riding Stables
Souvenirs	Smokemont Riding Stables
Firewood and Ice	Smokemont Riding Stables
Vending	Smokemont Riding Stables
Camper Convenience Items	Smokemont Riding Stables
<b>Authorized Services</b>	<b>Location</b>
Souvenir Photographs	Smokemont Riding Stables

*Source: National Park Service*

*Guided Horseback Rides*

The Draft Contract requires the Concessioner to offer (as a minimum) a guided 1-hour horseback ride, a guided 2.5-hour horseback ride, and a guided 4-hour horseback ride.

### *Wagon and Carriage Rides*

The Draft Contract requires the Concessioner to provide horse-drawn wagon and carriage rides lasting from one-half hour to three-quarters of an hour on the assigned trail.

### *Vending*

The Draft Contract requires the Concessioner to provide vending machine sale of soft drinks, fruit drinks, and bottled water.

### *Firewood and Ice*

The Concessioner must provide and sell bundles of well-seasoned, heat-treated firewood and kindling, and must always have at least 30 bags of ice available for purchase.

### *Souvenirs and Camper Convenience Items*

The Concessioner must sell camper convenience items and souvenirs for the use and enjoyment of Smokemont Campground campers. Specific items to be sold must be approved by the Superintendent and included in the Concessioner's Merchandise Plan. Souvenir items may include hats, tee shirts, post cards, and patches. Other types of souvenir items must be submitted to the Superintendent for approval. Souvenir items must be consistent with the theme of the Park and must be approved by the Superintendent before resale. Camper convenience items must primarily be packaged non-food items. A very limited selection of long shelf-life food items may also be approved by the Superintendent.

### *Souvenir Photographs*

The Draft Contract authorizes, but does not require, the Concessioner to sell souvenir photographs. Souvenir photographs may be taken for the purpose of sale to visitors only at the explicit request of the visitor.



## UTILIZATION AND OPERATING DATA

The Proposal Package, which Offerors must complete and submit as part of this solicitation, requires Offerors to develop financial projections based on the business to be operated. To assist Offerors in the development of these projections, the Service presents information regarding historical utilization, operating data, and financial projections, based on an assumed Draft Contract effective date of January 1, 2027. Please note that the Service's financial and operational projections are only estimates based on Service assumptions that were developed using publicly available historical data, industry standards, other comparable information from other facilities, and the Existing Concessioner's Annual Financial Reports.

Some or all of the Service's estimates or projections may not materialize and unanticipated events may occur that will affect these estimates and projections. Offerors are responsible for producing their own financial analyses and future financial projections and may not rely on the Service's estimates or projections. The Service does not warrant, and assumes no liability for, the accuracy of the financial projections or estimates contained in this Prospectus.

### Historical Revenue

Exhibit 6 presents concession annual revenue from 2021 to 2024 broken down by department.

<b>Exhibit 6. Revenues, 2021-2024</b>				
<b>Department</b>	<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
Guided Horseback Rides (incl. Wagon and/or Carriage Rides)	\$770,960	\$726,615	\$827,125	\$832,855
Vending	\$2,555	\$1,889	\$2,181	\$2,982
Souvenirs	\$14,154	\$15,795	\$14,036	\$10,948
Limited Retail, Vending	\$46,738	\$63,583	\$57,442	\$45,315
<b>Total</b>	<b>\$834,407</b>	<b>\$807,882</b>	<b>\$900,784</b>	<b>\$892,100</b>

*Source: National Park Service*

Exhibit 7 provides the annual franchise fees paid from 2021 to 2024.

<b>Exhibit 7. Franchise Fees Paid, 2021-2024</b>			
<b>2021</b>	<b>2022</b>	<b>2023</b>	<b>2024</b>
\$ 33,376	\$32,121	\$36,031	\$35,684

*Source: National Park Service*



## Future Revenue Projections

Exhibit 8 shows the projected departmental and total revenue for the first three years of the Draft Contract. The Service projects that total annual revenue will increase by average historical annual inflation (2.5 percent) during the term of the Draft Contract. The Service based this projection on a review of historic revenue growth rates for this operation and other riding stable operations in the Park.

<b>Exhibit 8. Projected Revenue by Department<sup>1</sup></b>			
<b>Department</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>
Guided Horseback Rides (incl. Wagon and/or Carriage rides)	\$893,808	\$916,154	\$939,058
Vending	\$2,780	\$2,849	\$2,921
Souvenirs	\$55,329	\$56,712	\$58,130
<b>Total</b>	<b>\$951,917</b>	<b>\$975,715</b>	<b>\$1,000,108</b>

Source: National Park Service

<sup>1</sup> These estimates are not warranted by the Service and the Service is not bound by these estimates. All Offerors are responsible for conducting their own due diligence and calculating their own revenue and expense estimates.

## Departmental and Indirect Expenses

The Service projects that departmental and indirect expenses will be within industry average ranges.

## Utility Expense

The Concessioner is responsible for contracting with independent suppliers to provide year-round water and sewer service, telephone service and electrical service. The Concessioner is responsible for direct payment to these suppliers. Duke Energy maintains the primary electrical lines within the Concessions Facilities. The Eastern Band of Cherokee Indians (EBCI) Water and Sewer Department provides water service to the Concession Facilities.

## Concession Facilities

A list of assigned land and real property improvements (“Concession Facilities”) along with a map can be found in Exhibit C to the Draft Contract.

The Barn and Equipment Storage Building, Covered Tie Stalls, Vending Hut, Orientation Hut, and Office are Temporary Facilities that are the personal property of the Existing Concessioner. The Existing Concessioner will remove these Temporary Facilities prior to the effective date of the Draft Contract unless the Concessioner purchases these facilities from the Existing Concessioner. If the Concessioner does not purchase these facilities, it will be the Concessioners responsibility to construct facilities approved by the Park.

The Concessioner will be responsible for maintenance, repairs, housekeeping, and grounds-keeping of the Concession Facilities, as provided in the Draft Contract.



## INVESTMENT AND OPERATIONS ANALYSIS

### Estimated Initial Investment

Exhibit 9 summarizes the estimated initial investment to be made by the Concessioner. The Service estimates that this initial investment will be approximately \$488,800 in 2027 dollars. This estimate includes the purchase of personal property, inventory and working capital, and start-up costs (staff hiring, training, etc.).

**Exhibit 9. Estimated Initial Investment (2025)<sup>1</sup>**

Item	Estimated Amount (2026 Dollars)
Personal Property	\$412,800
Personal Property Improvement Plan	\$50,000
Start-up Costs	\$ 16,000
Inventory and Working Capital	\$ 10,000
<b>TOTAL</b>	<b>\$488,800</b>

Source: National Park Service

<sup>1</sup> These estimates are not warranted by the Service and the Service is not bound by these estimates. All Offerors are responsible for conducting their own due diligence and calculating their own revenue and expense estimates.

### Personal Property

The estimated value of personal property is approximately \$412,800 in 2027 dollars. This amount represents equipment such as display racks required for visitor convenience items.

### Personal Property Improvement Plan

The Concessioner shall develop and implement a Personal Property Improvement Program to provide and maintain all facilities necessary for the riding stables operation in accordance with National Park Service design standards.

All structures shall comply with the architectural, material, and environmental standards established by the National Park Service for Great Smoky Mountains National Park. Facilities must be designed to blend with the natural surroundings and minimize visual impact.

The Concessioner shall provide and maintain, at a minimum, the following structures and related improvements:

- Barn
- Covered Stalls
- Office Building
- Vending Shed
- Equipment Building
- Related Fencing

If the existing personal property facilities from the previous concessioner are used, the Concessioner shall invest not less than \$50,000 in personal property improvements for the facilities listed above. This investment shall be completed within the first 6 months of the contract term and documented through invoices, receipts, and photographs. Documentation must be submitted to the Park Superintendent for verification.



All structures shall be constructed using high-quality, durable materials suitable for the Park environment. The Concessioner shall maintain all facilities in good condition throughout the contract term, ensuring safety, cleanliness, and compliance with Park standards. Prior to construction or installation of any facility, the Concessioner shall submit detailed plans and specifications to the Park Superintendent for review and written approval. All improvements must comply with applicable federal, state, and local regulations, as well as National Park Service policies.

### **Start-up Costs, Inventory, and Working Capital**

At the start of the Draft Contract, the Concessioner will need to make a one-time investment in a range of activities to ramp up operations. These activities include staff hiring, training that may involve compensation in addition to normal wages, systems implementation, legal support services, and marketing and advertising beyond normal annual expenditures. The Service estimates start-up costs to be approximately \$16,000.

In addition to any necessary investment in start-up activities, the Concessioner will need to invest a certain amount of cash in the operation to cover that portion of the operation's expenses that the Concessioner will likely incur in advance of offsetting revenues, including the purchase of initial inventory. The Service assumes the Concessioner will invest another \$10,000 in inventory and working capital.

### **Deferred Maintenance**

The Concessioner must cure all deferred maintenance (DM) for all real property assets assigned under the Draft Contract. As of the date of this Prospectus, the Service is not aware of any existing DM that the Concessioner will be required to cure under the Draft Contract.

### **Component Renewal**

The component renewal reserve will be equal to one percent (1%) of the Concessioner's annual gross receipts for the preceding year.

### **Leasehold Surrender Interest**

Per 36 C.F.R. § 51.51, leasehold surrender interest (LSI) means the following:

“[A] right to payment in accordance with this part for related capital improvements that a concessioner makes or provides within a park area on lands owned by the United States pursuant to this part and under the terms and conditions of an applicable concession contract. The existence of a leasehold surrender interest does not give the concessioner, or any other person, any right to conduct business in a park area, to utilize the related capital improvements, or to prevent the Director or another person from utilizing the related capital improvements. The existence of a leasehold surrender interest does not include any interest in the land on which the related capital improvements are located.”

For concession contracts authorizing the accrual of LSI, concessioners will be entitled to compensation for their LSI upon contract termination or expiration. Per 36 C.F.R. § 51.51, in general, the value of LSI is equal to:

“(1) the initial construction cost of the related capital improvement; (2) adjusted by (increased or decreased) the same percentage increase or decrease as the percentage increase or decrease in the Consumer Price Index from the date the Director approves the substantial completion of the construction of the related capital improvement to the date of



payment of the leasehold surrender interest value; (3) less depreciation of the related capital improvement...”

The Draft Contract is a Category I Contract, but there is no requirement for a Concession Facility Improvement Program.

### **Trail Maintenance Expenses**

The Maintenance Plan to the Draft Contract (Exhibit E) describes requirements for the maintenance of trails by the Concessioner. In order to meet these requirements, the Service anticipates that the Concessioner will use mechanized equipment that will be purchased or rented by the Concessioner. The Service must approve any mechanized equipment the Concessioner will use on trails and examples of the types of equipment considered suitable for this use are included in the Maintenance Plan. In addition, the Maintenance Plan specifies a minimum amount of tread hardening material that the Concessioner will have to apply annually to the trails. The personal property estimate provided above includes an amount for the purchase of specialized equipment to deliver tread hardening material for application on the trails such as an all-terrain utility vehicle and dump trailer. The Service also anticipates that the Concessioner will rent or purchase other equipment for the maintenance of trails such as a small-medium size mini-excavator or skid steer.

### **Franchise Fees**

Offerors must agree to pay the minimum franchise fee, as set out in Principal Selection Factor 5 of the Proposal Package, although Offerors may propose higher franchise fees in accordance with terms of the Prospectus.

The following describes the minimum franchise fee acceptable to the Service for each year of the Draft Contract: 4.8% of gross receipts.

### **Contract Term**

The Draft Contract will have a term of ten (10) years with an estimated effective date (start date) of January 1, 2027. This effective date may change prior to contract award if determined necessary by the Service. The Service will change the expiration date of the Draft Contract to provide the same term length (10 years) due to any adjustments to the effective date.



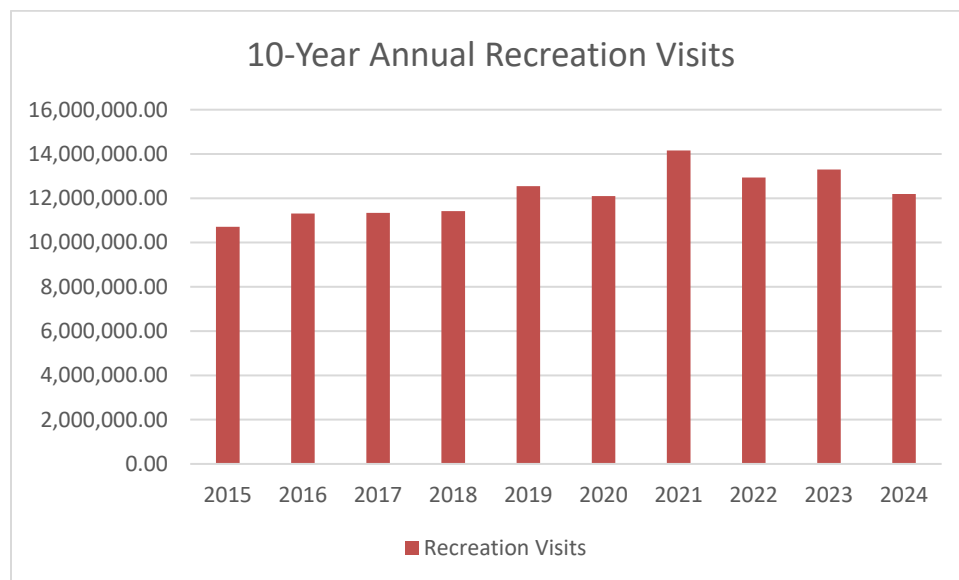
## PARK VISITATION

Great Smoky Mountains National Park is one of the most popular park units in the national park system with over 14 million recreational visits in 2021. Since the mid-1970s, the Park has attracted on average between eight and 10 million visitors annually. Of the 54 national parks with road access, the Park is the only one without an entry fee, because of the way in which Tennessee transferred ownership of Newfound Gap Road to the Federal Government.

### Annual Visitation Trends

Over the last 10 years, Park visitation has been increasing, peaking in 2021 with approximately 14.1 million visitors as shown in Exhibit 10. The lowest visitation during this period was approximately 10.7 million in 2015 and the average was approximately 12.2 million visits per year.

**Exhibit 10. Annual Visitation to Great Smoky Mountains National Park, 2015-2024**



Source: National Park Service Public Use Statistics Office

### Monthly Visitation Trends

Park visitation is seasonal with peaks in the summer and fall. Typically, visitation peaks in July and October. Cumulatively, these two months represented 26 percent of total 2025 visitation. Exhibit 17 illustrates the total monthly Park visitation between 2015 and 2025.

In recent years, visitation levels during the peak months have remained substantially higher than during the off-season months. However, because of the introduction of year-round school calendars in many of the Park's feeder markets, an increasing number of families are now frequenting the Park in the traditionally off-season months. This visitation pattern has resulted in visitation leveling out between the peak and off-peak months, while annual Park visitation has remained relatively stable.



**Exhibit 11. Great Smoky Mountains National Park, Recreation Visits by Month (2015-2025)**

Year	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
2025	276,999	409,449	845,724	986,442	1,114,160	1,336,144	1,435,337	998,056	981,366	1,561,683	867,677	714,902
2024	407,804	472,412	872,124	951,189	1,266,832	1,378,182	1,385,854	1,150,247	1,015,889	1,510,684	1,016,062	764,555
2023	459,626	506,742	879,991	1,026,754	1,229,626	1,545,906	1,609,741	1,289,406	1,307,865	1,704,922	975,806	761,262
2022	409,267	536,592	878,917	1,014,878	1,227,558	1,486,757	1,560,696	1,266,172	1,315,818	1,624,908	945,444	670,626
2021	525,801	502,459	931,060	1,169,469	1,363,183	1,539,247	1,730,987	1,398,161	1,355,599	1,633,547	1,155,227	856,808
2020	438,509	426,839	487,535	99,371	828,792	1,535,660	1,726,187	1,544,254	1,400,171	1,739,720	1,091,098	777,584
2019	496,743	421,770	786,305	999,259	1,096,056	1,469,857	1,613,133	1,411,231	1,273,326	1,408,013	851,419	720,631
2018	320,864	399,156	689,235	820,657	985,145	1,401,741	1,468,273	1,195,360	1,369,637	1,263,665	867,110	640,357
2017	382,161	457,921	690,615	867,375	907,646	1,304,711	1,492,508	1,235,188	1,282,168	1,336,369	817,238	564,993
2016	379,730	353,532	778,211	859,420	1,018,224	1,364,138	1,464,456	1,183,778	1,165,098	1,466,584	810,894	468,721
2015	373,315	244,214	598,835	794,886	1,017,955	1,307,646	1,441,603	1,208,882	1,096,723	1,353,454	707,576	567,585

Source: National Park Service Public Use Statistics Office

**Visitor Origin**

Almost all (99 percent) of the visitors frequenting the region are from the U.S. with the majority of visitors from the nearby states of Tennessee, Florida, Alabama, and North Carolina. These states represent the largest feeder states to the Park and collectively represent approximately 50 percent of annual visitation.

The geographic origin of Park visitors varies between the two peak seasons. Approximately 61 percent of visitors during the summer are from the Southeast as compared to 69 percent during the fall. This pattern is consistent with conversations with local tourism officials who indicated that the region attracts slightly more single day trips during the fall to see the foliage. Exhibit 12 depicts four and eight-hour driving radii from the Park.

**Exhibit 12. Four and Eight-Hour Driving Radii from the Park**



Source: Microsoft MapPoint

### Gateway Cities

Several gateway cities, including Gatlinburg, Pigeon Forge, Townsend, and Sevierville in Tennessee and Cherokee and Bryson City in North Carolina, surround the Park. These towns and communities rely almost entirely on tourism and their proximity to the Park for their livelihood. The infrastructure and development in these gateway cities are vital to their livelihood, particularly on the Tennessee side, because the nightly visitor base is approximately 10 times larger than the actual population. Exhibit 13 and Exhibit 14 show the gateway cities in Tennessee and North Carolina.

**Exhibit 13. Tennessee Gateway Cities**



Source: Microsoft MapPoint

**Exhibit 14. North Carolina Gateway Cities**



Source: Microsoft MapPoint

## MARKET AREA OVERVIEW

### Attractions and Demand Generators

While the Park seems to be the primary driver of visitation to the region, the Tennessee and North Carolina gateway cities also have their own attractions and demand generators contributing to overall visitation to the region.

#### *Tennessee Demand Generators*

The Gatlinburg-Pigeon Forge area is home to many commercial visitor attractions, some within the top five in Tennessee. The region's major demand generators are Dollywood, Ripley's Aquarium, Ober Gatlinburg, Gatlinburg Convention Center, LeConte Event Center, The Island at Pigeon Forge, Rocky Top Sports World, museums, and numerous shopping options.

The area's primary demand generator is Dollywood, which is also the number one commercial attraction in Tennessee, along with Dollywood's Splash Country, a popular adventure waterpark. Dollywood and Splash Country are amusement park attractions that Dolly Parton established offering visitors' rides, festivals, shows, heritage, crafts, and dining outlets.

Another major demand generator is the areas' convention centers located in Gatlinburg and Pigeon Forge. Gatlinburg is home to the Gatlinburg Convention Center, a 278,000-square-foot facility that has historically operated at 67 percent utilization. The LeConte Center at Pigeon Forge opened in 2014 and is a 232,000-square-foot facility. These facilities hold trade shows, corporate groups, regional associations, and youth groups. Visitors also come to peruse the nearby local shops, restaurants, and museums found near the centers.

Located adjacent to the LeConte Center is the newly opened Island in Pigeon Forge. The Island includes a variety of major restaurants, such as Margaritaville and Paula Deen's Family Kitchen, retail shops, rides, games, and nightly live music. The Island's centerpiece is a 200-foot-tall Ferris wheel. The Island is a new attraction to the area and has continually expanded since it's opening in 2014.

Rocky Top Sports World in Gatlinburg opened in 2014 and provides indoor/outdoor sports facilities for tournaments and sporting camps. The complex includes seven outdoor fields with synthetic turf and an 86,000-square-foot indoor facility. The facility was built to appeal to the growing sports tourism market. The complex is utilized year-round for a multitude of sporting events including soccer, football, basketball, and volleyball.

Soaky Mountain Waterpark is a brand-new attraction that opened to the public in the summer of 2020 in Sevierville, Tennessee. The 50-acre Soaky Mountain Waterpark has more than 19 attractions. Among the adventures is an innovative water coaster and massive 35,000-square-foot wave pool that can create six-foot tall waves.

Townsend, which advertises itself as the Peaceful Side of the Smokies, is in Blount County, Tennessee. Townsend and offers a variety of overnight lodging, restaurants, craft shops, and visitor attractions.



**Exhibit 15. Gatlinburg, Tennessee**



**Downtown Gatlinburg**



**Gatlinburg from Above**



**Sevierville**



**Pigeon Forge**

Source: National Park Service

Exhibit 16 lists county tax revenues and tourism metrics for 2023 Blount and Sevier Counties.

**Exhibit 16. County Tax Revenues and Tourism Metrics – Blount and Sevier County, TN**

2023 Metrics	Blount County	Sevier County
Annual Direct Tourism Expenditures	\$ 576.09 Million	\$3,851.46 Million
Local Tax Revenue	\$23.30 Million	\$182.43Million
State Tax Revenue	\$31.69 Million	\$247.84 Million
Average Daily Tourist Expenditures	\$1.6 Million	\$10.55 Million

Source: 2023 Economic Impact of Travel on Tennessee , Tennessee Department of Tourist Development, [2024 Economic Impact 9.10.24](#)

**Lodging Market**

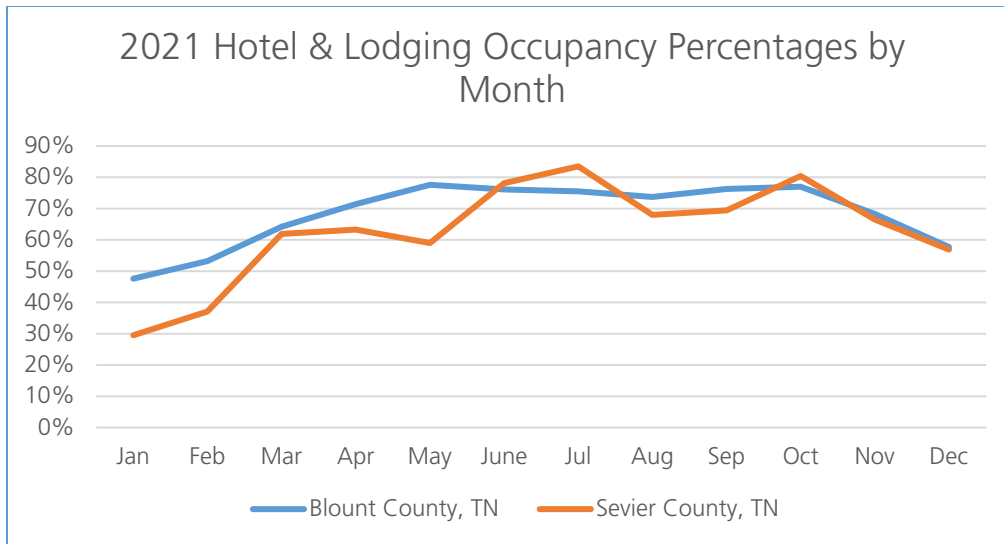
Because visitors to the region frequently visit the Park, overnight demand trends provide insight into monthly and weekday/weekend visitation trends.



**Hotel Occupancy Analysis**

In 2021, July hotel occupancies were 76 percent for Blount County and 84 percent for Sevier County. Hotel occupancy peaks in June thru July and October, as depicted in Exhibit 17. Occupancy rates are lowest during the winter months.

**Exhibit 17. Blount and Sevier County, TN, Monthly Occupancy**



Source: Smith Travel Research, Hendersonville, Tennessee

**North Carolina Demand Generators**

The primary demand generator near the Cherokee, North Carolina, entry point to the Park is the Harrah’s Cherokee Casino & Hotel with 3.6 million visitors. An enterprise of the Eastern Band of the Cherokee Nation, the Casino has 150,000 square feet of gaming space with slot machines and table games. The property also features over 1,100 hotel rooms, 10 restaurants, 3,000 seat Event Center, and 8 retail shops.

**Exhibit 18. Cherokee, North Carolina**



**Harrah’s Cherokee Casino & Hotel**



**Downtown Cherokee**

Source: National Park Service

In addition to the casino, the Park’s North Carolina side attracts visitors to its cultural activities in the region. Many of these activities are associated with the nearby Cherokee Indian Reservation and include museums, theaters, drama related to Cherokee history, Qualla arts and crafts, and recreational activities such as trout



fishing, hiking, whitewater rafting, and canoeing. According to local tourism officials, there is a perception that the Cherokee area has shifted from a family to an adult-oriented destination, which has affected Park-related visitation levels.

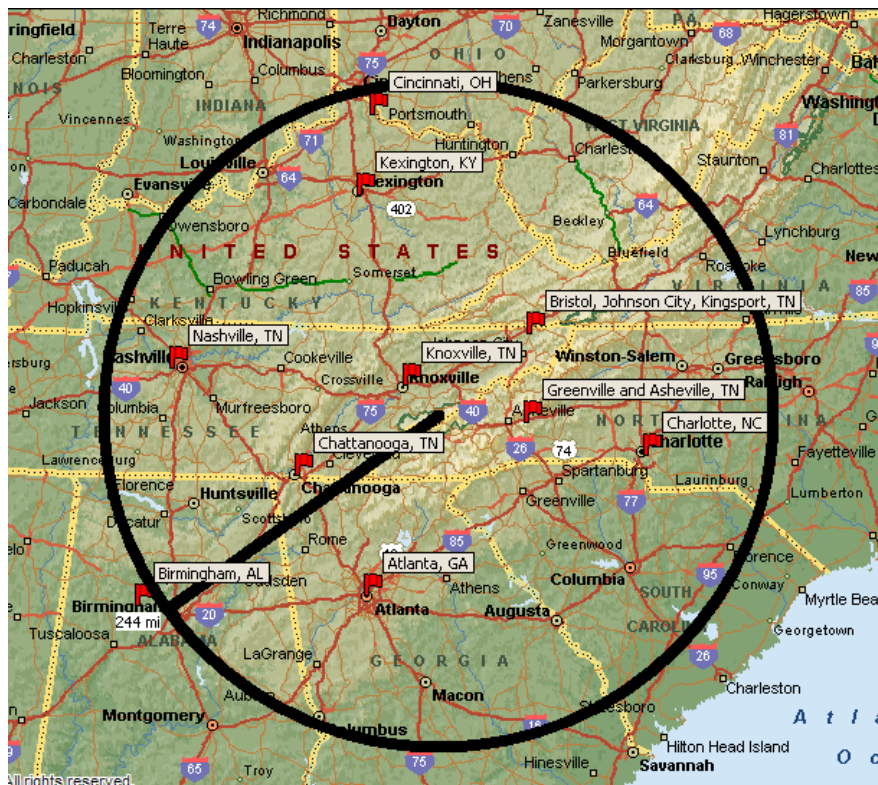
**Key Feeder Markets**

Although the Park tracks visitor origin only by state, the surrounding gateway cities also track visitor origin by specific feeder market. Given that visitors to the region are also visitors to the Park, there is a high correlation between gateway and Park feeder markets. Based on discussions with tourism officials, Exhibit 19 represents the top 10 feeder markets to the gateway cities surrounding both sides of the Park. The region’s primary feeder market is the greater Atlanta area located approximately four hours to the south.

**Exhibit 19. Top 10 Key Gateway City Feeder Markets Statistics**

City	Distance (Miles)	Driving Distance (hrs)	Population (2023)
Knoxville	35	1	946,264
Asheville	38	1	417,202
Bristol, Johnson City, Kingsport	75	2	313,025
Chattanooga	110	2.75	580,971
Atlanta	138	3.75	6,307,261
Charlotte	160	3.5	2,805,115
Nashville-Davidson	181	3.75	2,102,573
Lexington	205	3.5	520,045
Cincinnati	242	4.5	2,271,479
Birmingham	244	5	1,184,290

**Exhibit 20. Top 10 Key Gateway City Feeder Markets Map**



Source: Various

## Market Area Summary

Great Smoky Mountains National Park is one of the most visited national parks. The surrounding area features a robust tourism industry, and there continues to be demand for the services and offerings the Park provides. Research and analysis of the Park's market indicate that visitation levels for the foreseeable future are likely to remain consistent with post-2020 visitation levels, at nearly 14 million visitors per year.

Based on the research conducted for this Prospectus, the Service anticipates that demand for guided horseback rides, wagon and/or carriage rides, vending, firewood and ice, camper convenience items, souvenirs, and souvenir photography is likely to remain consistent with historical demand. In 2023, the North Carolina side of the Great Smoky Mountains National Park recorded over 3 million visits. Visitors tour the area to view the landscape and enjoy the campground and picnic area.

## PREFERRED OFFEROR DETERMINATION

The National Park Service Concessions Management Improvement Act of 1998 includes the limited right of preference in renewal for statutorily defined outfitter and guide services and small contracts. The Service has determined, per 36 C.F.R. Part 51, that the Existing Concessioner is not a "preferred offeror" who is eligible to exercise a right of preference for the award of the Draft Contract.

